Special Report

Healthcare Marketing

Troy Thomas

Balancing act tough in ailing market

By Julie Liesse Erickson

After nearly a decade of experimenting with miracle cures, the healthcare marketing industry is prescribing familiar remedies.

Advertising has not proved a panacea for the financial and competitive challenges resulting from industry reorganization. Neither have other wonder drugs such as health maintenance organizations, urgent care centers, outpatient surgery, home healthcare, hospital diversification, chain insurance ventures or "branded" healthcare—all of which generally have left many healthcare practitioners poorer and disillusioned.

In response, healthcare marketing is moving into a conservative era that emphasizes providing quality care and building bridges with physicians—who again are perceived as hospital gatekeepers.

"The top issue in healthcare advertising is quality, and how to express it," says Arthur Sturm, president of Chicago-based Sturm Communications Group, an ad agency specializing in healthcare clients.

In a just-released study of 1,600 healthcare executives and opinion leaders, 91% agree that by 1995, the industry will have defined and accepted standards for quality treatment. The study, conducted by accounting firm Arthur Andersen & Co. in conjunction with the American College of Healthcare Executives, concludes that to maintain market share, healthcare facilities must establish data-gathering systems to monitor quality—and then report the results in advertising to consumers and employers.

"A lot of consumers and employers are looking for tangibles in the quality area," Mr. Sturm says. "But how do you express quality in your advertising, without quoting mortality rates?"

That tactic has caused cries of outrage from

(Continued on Page S-2)

Hospital spending escalates

	1987	% change from '86
Avg. hospital ad budget (millions)	$146,100	43.0
Total industry marketing and advertising (millions)	$1,180	7.2
Total industry advertising (millions)	$726	45.2

Source: SRI Gallup Hospital Market Research

Balancing act tough

(Continued from Page S-1)
healthcare professionals in New York and other markets. Even seemingly innocuous ad claims—such as a Milwaukee hospital billing itself as "the best and brightest"—still raise eyebrows.

"I think consumers make their assessment of a facility's quality based on three factors: the degree of technical sophistication or specialization; the caliber of the medical staff, and the quality of the experience for both doctor and patient," Mr. Sturm says.

But as consumers become more sophisticated about healthcare, they'll seek out more concrete information when comparing hospitals, HMOs and doctors, says Daniel Beckham, president of Arlington Heights, Ill.-based HealthMarket, a healthcare marketing consultancy.

The development of "Consumer Reports"-style ratings of healthcare facilities will increase; already in some states, including Minnesota and Pennsylvania, private concerns are selling this kind of information to employers.

"To a large degree, healthcare has operated under a veil of secrecy," Mr. Beckham says. "It's an old tradition to not talk about your patients, let alone other doctors."

Addressing the quality question, however, may be advertising's last operation for a healthcare industry bent on keeping up with the latest technologies. "Very few hospitals have the resources to have the ultimate healthcare center and still have dollars to drive demand," Mr. Sturm says.

"The big question for the future of healthcare advertising is how facilities are going to allocate their resources."

"What we're seeing this year is a much more conservative approach to healthcare marketing in general," says Karen York, president of Los Angeles-based York Alpern, an Omnicom Group ad agency specializing in healthcare marketing.

"The newest trend is a move toward everything old," says Mr. Beckham. "There's been a lot of experimentation over the past five years. It's been good for the industry because it learned a lesson; but it's too bad all the money and resources were wasted."

Advertising is a prime scapegoat. "I think in the majority of cases, hospitals haven't seen a return on their advertising investment," Mr. Beckham says. "I see a resulting real downturn in spending—maybe not on a total industry figure, but on a per-hospital basis."

Not everyone is willing to make that blanket statement. Estimates from SRI Gallup Hospital Market Research, Chicago, show ad dollars for hospitals and hospital chains increasing to $726 million in 1987, up 45.2% from last year. That means advertising will consume 61.5% of hospital marketing dollars, which SRI Gallup predicts will increase 7.2% to $1.18 billion, this year.

The U.S. Department of Commerce pegs healthcare as a $455 billion industry, accounting for about 10.9% of the 1986 U.S. gross national product.

SRI Gallup also reports that 91% of the nation's nearly 7,000 hospitals advertised in 1986, up from 64% in 1985. By 1990, the company predicts, hospital advertising will represent a $1 billion business.

Much of the increase is coming from the South, where SRI Gallup expects hospitals to boost ad spending to an average of $122,500 this year, up 75% from 1986. Southern hospitals are playing catch-up with their counterparts in other parts of the country; in the North Central states' more advanced healthcare market, SRI Gallup actually projects a decrease in average ad spending, to $114,800 this year. The average ad budget is pegged at $227,700 in the West and $94,000 in the Northeast.

"The increase in advertising expenditures will continue," says Steven R. Steiber, SRI Gallup senior VP-research and development. "Although there's been a lot of press for the naysayers, hospitals still have to take their message to the marketplace, particularly in a more crowded marketplace."

Besides the costs, individual hospitals are controlling the impact of advertising. "The chains have been under the greatest pressure to get their act together and offer marketing programs which individual hospitals can use," Ms. York says. "But corporate marketing has not been very successful. The chains can package programs with terrific creative, but it's still up to the hospital-level marketing personnel to implement—and there is a dearth of hospital-level marketing managers," she says.

Because of their inability to offer consumers broad-based, standardized healthcare, "The chains are focusing on specializing," Mr. Sturm says.

"Advertising has never received consistent support [from the chains]. I'm not sure they know what to do to leverage their market share."

When individual hospitals do choose to advertise, top executives more frequently are involved in the decision making. "The key to the future of hospital marketing is the involvement at the hospital ceo level," Ms. York says. "That represents a critical change for the industry. Ad agencies too often work with the marketing department just as paper suppliers work with the purchasing department—as mere vendors."

But although more marketing professionals are breaking into healthcare, less than 1% of U.S. healthcare ceo's are estimated to have marketing experience, says Stephen W. Brown, professor and executive director of the First Interstate Center for Services Marketing at Arizona State University, Tempe.

Healthcare marketing executives are rethinking advertising's role. In a 1986 SRI Gallup study of 250 U.S. hospital marketers, 23% said the primary goal of increased ad expenditures is increasing patient volume. In a similar 1984 study, by contrast, 36% of the respondents listed public relations as marketing's principal responsibility. This bottom-line mentality leads industry experts, including Mr. Steiber, to predict an increase in advertising impact research.

"Remember that marketing still accounts for less than 1% of the average hospital's revenues," he says. "That's not much money to spend on advertising, and most of it has gone to creative development; until now, hospitals haven't had the money to measure anything but top-of-mind awareness."

The messages researchers are tracking have changed substantially from even a year ago. "Image marketing is a thing of the past," Ms. York says. "Product or service-line marketing, which replaced that, is even more effective."

The emphasis on products and services has helped healthcare marketing executives sidestep the question of defining their ultimate consumer: the doctor who admits patients into hospitals; the consumer who frequently chooses between hospitals and urgent care centers; or the employer who, by selecting from available insurance and HMO plans, helps direct where employees will be treated. Specific services, such as women's health or children's psychiatric programs, have clearly defined targets.

Specialization has led to the development of new forms of delivery systems, Ms. York says. "Most center around a trend toward contract management: hospitals buying services rather than developing their own. Many are asking whether they can be the supermarkets of healthcare services."

"You'll be seeing more joint ventures between hospitals and physician groups in setting up urgent care centers, cardiology programs, ambulatory care centers and other specialized facilities," says Mr. Brown, author of two books on physician marketing.

While doctors use entrepreneurial ventures like these to regain leverage in the industry, HMOs may become a less powerful component of the healthcare delivery system.

Minneapolis, often considered a bellwether for the U.S. healthcare industry, shows signs that doctors, employers and consumers are becoming

(Continued on Page S-4)

LOOKING FOR A NEW JOB IN HEALTHCARE MARKETING OR ADVERTISING?

What better place to find the most recent career opportunities in this fast-growing field, than in Ad Age's Recruitment Marketplace.

To find a listing of these career opportunities, look for the "Healthcare Marketing/Advertising Careers" banner on page 79 in this week's Recruitment Marketplace.

Advertising Age
The Recruitment Marketplace

Reach the key players across the health industry...

HEALTHWEEK
Baxter signs $300 million exclusive contract with VHA for lab supplies
Biotech sees mixed signals in FDA regs

HealthWeek:
The Newspaper for America's Health Industry
A CMP Publication

For more information about HealthWeek, including our media kit and Charter Advertising Program, please call or write John Danner, Publisher: 415/654-4567

HealthWeek, 2200 Powell Street, Emeryville, CA 94608

Quality, cost controls meet in middle

By Diane Stafford

A commonly prescribed antibiotic used to prevent infections in cardiovascular surgery patients at Minneapolis' Abbott Northwestern Hospital was costing each patient about $155 a day, or nearly $600 per patient for the prescribed period.

The hospital's annual bill for this drug was $900,000—a price once paid without question.

However, with some tough cost-cutting goals from hospital administrators and a three-year study completed in 1986, a newer antibiotic is now costing patients just $62 a day, which means an annual $600,000 savings for Abbott Northwestern.

Diane Stafford is Advertising Age correspondent in Kansas City, Mo.

Charles Peterson, the director of clinical pharmacy responsible for the study, determined the newer antibiotic could be substituted for the commonly prescribed one with no change in the quality of care.

In the multi-billion-dollar healthcare industry, $600,000 doesn't sound like much. But it's an example of the don't-overlook-anything attitude gripping a field trying to hold down healthcare costs without sacrificing the quality of care.

"Doctors often prescribe medication without knowledge of the cost," says Mr. Peterson. "In this study we monitored one drug therapy to make sure we were using the most cost-effective medication. We weren't."

Healthcare providers and consumers are learning to apply Mr. Peterson's lesson to all medical relationships: "Good communication, that's

Cheaper but similar drugs, good communications define times of managed healthcare

the key," Mr. Peterson says. "In our case, we got the clinical pharmacists working with the physicians to prescribe more cost-effective therapies."

Skyrocketing insurance and healthcare costs, coupled with more stringent payout standards by Medicare and Medicaid, have sent consumers, businesses, insurance companies and care providers scrambling to hold the bottom line.

"We have entered the era of managed healthcare," says Leonard Brauner, manager of healthcare consulting at the Kansas City, Mo. office of Laventhol & Horwath, an accounting firm. "Employers and insurance companies are creating financial incentives to encourage consumers to look at less expensive options. And the impact on the care provider is an emphasis on productivity."

The first round of cost-cutting at hospitals—primarily labor force reductions—was easy because "there was so much fat before," Mr. Brauner says. Now, hospital administrators are learning to apply cost-benefit analysis to each department or service, he says.

Departments showing the most cost-effective profit potential are the ones that frequently get the hospital's marketing emphasis.

At Sherman Hospital in Elgin, Ill., a back-injury screening program is meeting both cost-effective and open-communication goals.

In the last year, marketing costs of about $4,000 covered two direct mailings—a total of 3,000 pieces—newsletters and personal visits to ceos and benefits managers. Maggie Springer & Associates, Appleton, Wis., a healthcare marketing agency, handled development and marketing.

At a cost of $42 a session, the hospital's occupational health specialists are working with certain businesses to examine their employees' backs in 45-minute screenings that include evaluation of posture, general strength, weight, flexibility, overall fitness and previous back injuries.

"Forty-two dollars may sound like some out-of-pocket expense that employers might not want to pay," says Connie O'Neill, business relations manager at Sherman, "but compare that to a back X-ray that's probably $65 at the minimum and $150 for different angles.

IPMR
We track over 25,600 ads every month in 150 business and consumer magazines.
We can tell you where your competition is...what they spend...how much on each brand, by month, by book.
Call: (312) 446-9233.
PATTERSON ADVERTISING REPORTS, INC.
550 Frontage Road • Northfield, IL 60093

Balancing act

(Continued from Page S-2)
disenchanted with HMOs.

Figures from Steve Hillestad, VP-marketing for Minneapolis' Abbott Northwestern Hospital and its holding company, Lifespan Inc., show HMO enrollment in the Minneapolis area has grown steadily in the past five years—HMOs and preferred-provider organizations control 40% to 45% of the market—but has leveled off during the last 18 months.

So far, Mr. Hillestad says, "It's a myth that people are rushing to disenroll from HMOs and going back to fee-for-service arrangements; if anything, they're switching to another prepaid plan. There's been a lot of public press about HMO woes. We believe it may lead to HMO disenrollment, but we won't know until . . . January."

In response to perceived low payment from HMOs, physicians in the Twin Cities have discussed the possibility of unionizing. However, most industry executives don't believe doctors have the interest or need to organize.

"As more of the U.S. population gains experience with care under an HMO, you'll see more disenrollment," Mr. Beckham says.

"HMOs are a fine solution for many people, but not for all," Ms. York says. There's a problem at the decision-maker level; promised cost savings haven't been realized."

"Patients are just beginning to realize they have a choice in healthcare," Mr. Hillestad says. "Once everyone realizes this, service delivery will have to be very high." AA

BROGAN KABOT ADVERTISING HAS SENT A LOT OF PEOPLE TO THE HOSPITAL.

To Detroit's biggest, most prestigious hospital. In just one year we helped create a major increase in clinic visits with our national award-winning broadcast, print, outdoor and direct mail advertising. We've also done successful advertising for their affiliated community hospital, specialty centers, suburban clinics, breast center, chemical dependency center, 3 HMO's and a PPO.

We'd like to perform the same operation for other hospitals in other cities. So if your medical advertising needs intensive care, call Karen Cashen or Marcie Brogan at (313) 353-9160. (We'll even tell you who our clients are and show you our work for them.)

BROGAN KABOT
ADVERTISING CONSULTANCY
3000 Town Center • Suite 475 • Southfield, MI 48075 • (313) 353-9160

30% of our readers own a bicycle. 24% own golf irons, and 23% own weights or other exercise equipment.

50plus
850 THIRD AVE. • NEW YORK, NY 10022 • (212) 715-2781

Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

SEPTEMBER

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
— Art & antiques —				
Art & Antiques (10X)	119.8	67.8	509.3	386.6
Art News (10X)	95.0	80.9	771.4	673.9
Southwest Art	80.3	79.5	754.8	637.7
Total Group	295.2	228.2	2,035.5	1,698.2
% change		29.4%		19.9%
— Auto/cycle/rec. vehicles —				
ATV Sports	45.1	60.5	387.4	522.2
Autoweek (52X)	132.4	149.1	1,327.7	1,272.5
Car & Driver	86.6	71.4	844.5	786.1
Car Collector & Car Classics	17.7	14.5	155.1	140.8
Car Craft	84.0	81.2	778.9	676.3
Circle Track	89.6	61.6	697.4	561.8
Cycle	27.5	27.9	432.7	411.9
Cycle World	38.7	19.4	478.1	431.4
Dirt Rider	27.4	26.3	313.1	363.7
Dune Buggies & Hot VWs	77.0	85.8	690.0	791.7
Family Motor Coaching	148.8	129.3	1,403.4	1,319.8
4 Wheel & Off-Road	93.3	92.4	799.9	785.8
Four Wheeler	81.0	77.0	772.0	751.0
Hot Rod	77.5	56.9	683.3	557.6
Motorcyclist	29.8	24.3	448.7	437.7
Motor Trend	57.5	50.0	694.1	569.2
Motorhome	86.8	83.0	770.6	843.9
Rider	27.7	28.1	387.8	461.6
Road & Track	90.0	81.4	918.7	873.3
Trailblazer	51.5	41.6	421.6	342.2
Trailer Life	110.8	93.0	948.4	1,025.2
Total Group	1,480.6	1,354.7	14,353.5	13,925.7
% change		9.3%		3.1%
— Boating & yachting —				
Bowling	154.3	143.5	1,372.9	1,250.1
Chesapeake Bay	51.9	41.0	406.0	339.4
Cruising World	116.5	115.8	1,015.5	1,086.5
Lakeland Boating (11X)	69.5	71.2	657.6	629.2
Motor Boating & Sailing	159.7	159.3	1,479.2	1,563.6
Sail	108.5	113.0	981.2	1,017.9
Small Boat Journal(6X)	—	—	228.3	213.0
Trailer Boats(11X)	32.9	36.0	500.5	395.0
Western Boatman(6X)	30.8	32.5	186.1	195.3
Yachting	141.7	121.2	1,273.1	1,250.2
Total Group	865.8	833.5	8,100.4	7,940.2
% change		3.9%		2.0%
— Canadian —				
L'Actualite	79.2	88.0	654.1	698.8
Chatelaine:				
English Edition A.	98.3	108.8	663.2	813.0
French Edition	83.5	94.1	602.6	694.1
City & Country Home(10X)	73.0	64.0	381.8	333.9
Equinox	47.1	41.3	192.3	188.5
Flare A.	177.6	179.0	741.9	706.6
Harrowsmith-Canada (6X)	56.4	40.0	225.8	195.2
Macleans (52X) A.	127.2	105.8	927.6	1,039.5
Moneywise	35.7	35.2	275.2	302.6
Reader's Digest:				
Canadian-English A.	58.6	83.0	495.5	671.7
Canadian-French A.	47.0	68.0	372.3	553.9
Toronto Life	118.0	96.7	797.2	741.2
Vancouver	93.9	94.2	583.9	654.2
Total Group	1,095.6	1,098.1	6,913.4	7,593.2
% change		-0.2%		-9.0%
— Civic/fraternal —				
American Legion	54.3	20.6	304.0	211.4
Elks (10X)	19.8	19.3	157.6	147.1
Kiwanis	20.8	17.5	143.3	143.7
Lion (10X)	7.3	7.0	63.8	47.6
Rotarian	12.6	18.0	126.8	131.5
V.F.W. (11X)	33.8	25.7	251.8	216.1
Total Group	148.6	108.1	1,047.3	897.4
% change		37.5%		16.7%
— Comics —				
Archie Comics Group	7.0	7.5	56.0	35.0
DC Comics	8.0	8.0	58.0	47.0
Marvel Comics Group	9.0	9.0	80.5	70.0
Total Group	24.0	24.5	194.5	152.0
% change		-2.0%		28.0%
— General —				
American Health (10X)	57.8	74.2	501.0	438.2
American Heritage (7X)	47.2	16.6	188.8	85.1
American West (6X)	36.0	30.8	183.5	197.2
The Atlantic A.	46.4	37.2	299.3	311.3
Bon Appetit A.	69.4	69.7	694.5	671.8
Changing Times	60.9	57.3	544.5	429.1
Conde Nast's Traveler	74.5	—	74.5	—
Connoisseur	88.0	74.4	610.9	559.5
Consumers Digest (6X)	26.3	26.3	113.3	134.8
Ebony	88.1	87.2	812.8	833.3
Fifty Plus	40.1	44.1	343.1	355.7
Food & Wine	60.5	54.7	482.4	397.8
Games (6X)	—	—	76.3	172.3
Golden Years	40.1	30.5	529.7	217.8
Gourmet	100.7	93.8	832.4	761.4
Harper's A.	34.4	22.7	266.5	204.8
Harrowsmith (6X)	57.3	41.9	243.0	199.3
Life's Live	41.0	46.0	399.0	434.0
Life	43.8	45.6	406.4	456.3
Mature Outlook	44.9	46.0	240.9	225.3
Modern Maturity (6X)	35.0	41.0	177.7	170.4
Money	118.6	105.1	1,059.7	1,033.7
Money Maker	—	—	21.8	—
Moneyworth (4X)	—	—	34.2	30.5
Mother Earth News (6X)	56.4	57.4	263.4	259.3
Mother Jones (9X)	—	—	102.6	118.8
National Geographic	19.3	19.4	172.8	193.1
National Geographic Traveler(4X)	31.0	27.7	117.0	106.2
Natural History	34.7	43.2	292.7	356.0
Prevention	62.6	66.7	558.2	542.5
Psychology Today	23.9	32.3	259.3	254.3
Reader's Digest A.	54.4	65.4	770.3	815.4
Rx Being Well (6X)	34.0	26.0	125.0	100.5
Saturday Evening Post (9X)	37.5	37.9	248.2	227.2
Smithsonian	96.6	92.9	709.6	683.2
Sylvia Porter's Personal Finance (10X)	43.8	45.5	346.0	294.2
Town & Country	190.9	175.9	1,072.1	1,038.7
Travel-Holiday	47.7	48.5	466.8	380.0
Travel & Leisure	107.5	92.7	820.5	870.2
Vanity Fair	126.4	62.2	564.2	371.8
Writer's Digest	33.0	26.5	252.9	222.8
Total Group	2,210.5	1,965.1	16,277.6	15,153.5
% change		12.5%		7.4%
— Home —				
Americana (6X)	26.8	25.0	107.7	136.4
Architectural Digest A.	129.5	118.2	1,047.1	1,016.7
Better Homes & Gardens	109.3	93.5	939.1	932.1
Columbus Monthly-Homes (4X)	—	—	86.9	81.7
Country Home (6X)	77.2	60.5	277.8	236.3
Country Living	104.5	88.3	759.4	634.1
Family Handyman (10X) A.	60.7	45.4	412.2	433.7
Flower & Garden (6X)	—	—	172.4	156.4
Home	78.6	59.4	468.7	424.6
Home Mechanics	55.4	53.3	501.8	518.2
The Homeowner (10X)	43.8	33.4	254.7	221.2
Horticulture	31.6	32.7	328.0	330.2
House Beautiful	84.4	67.1	618.3	626.2
House & Garden	104.8	104.9	795.2	793.0
Houston Home & Garden	58.7	56.1	624.5	663.3
Metropolis	60.9	42.9	422.0	248.0
Metropolitan Home	69.2	65.0	553.9	505.0
1,001 Home Ideas	46.4	69.9	430.8	369.5
Phoenix Home/Garden	74.3	65.7	628.0	591.3
Practical Homeowner	51.8	57.3	333.9	375.0
Rodale's Organic Gardening	54.0	43.8	447.5	524.3
San Diego Home/Garden	59.1	63.7	587.2	604.5
South Florida Home/Garden	25.4	40.8	259.8	279.6
Southern Accents (6X)	142.2	113.3	500.1	491.2
Southern Living	122.6	133.6	1,043.1	1,216.6
Sunset Magazine A.	127.3	118.2	1,068.8	1,201.4
Workbench (6X)	46.9	45.3	227.6	236.6
Total Group	1,845.5	1,697.1	13,896.5	13,847.0
% change		8.7%		0.4%
— In-flight & other passenger —				
Alaska Airlines	52.6	64.2	487.8	526.5
America West Airlines	71.0	47.2	436.2	214.8
American Way (24X)	148.2	110.2	925.1	832.4
Brighton Inflight Group:				
Continental	49.3	30.4	397.6	278.8
Hawaiian Air (6X)	25.4	—	83.0	—
East/West Network:				
Eastern Review	61.5	93.5	596.5	890.6
Northwest	61.0	45.8	415.0	404.7
PSA Magazine	103.8	99.3	740.8	796.1
Pan Am Clipper	49.0	44.3	369.8	401.5
Spirit	67.8	105.0	528.7	868.3
TWA Ambassador	57.5	—	436.6	—
Vis 'A Vis	63.2	99.1	509.0	847.6
Halsey Publications:				
Delta Sky	94.3	80.5	707.5	659.3
US Air	65.0	55.5	440.8	400.0
Piedmont Airlines' Pace	93.6	102.5	788.8	748.1
Spirit of Aloha (6X)	33.1	24.4	278.0	251.1
Total Group	1,096.3	1,001.9	8,141.2	8,119.6
% change		9.4%		0.3%
— Men's —				
Esquire A.	150.5	140.7	789.1	844.5
Firehouse Magazine	59.7	52.8	404.3	367.8
Gentlemen's Quarterly A.	305.1	285.4	1,321.6	1,346.0
Muscle & Fitness	134.3	113.7	1,108.6	985.4
Penthouse A.	43.6	49.5	364.0	329.7
Playboy A.	55.8	44.8	466.9	536.5
Salute (8X)	27.6	24.0	150.5	91.0
Total Group	776.6	710.8	4,605.0	4,500.8
% change		9.3%		2.3%
— Metropolitan —				
Aloha (6X)	21.5	34.2	151.4	148.2
Atlanta	75.7	57.5	519.9	465.2
Baltimore	88.3	85.3	633.4	667.1
Boston	205.1	165.6	1,424.5	1,345.5
California	58.2	53.0	520.2	597.1
Chicago	124.9	188.1	917.1	1,140.7
Chicago's North Shore	93.5	94.7	746.2	722.4
Cincinnati	47.5	532.8	61.1	519.5
Cleveland	65.2	63.5	609.6	617.1
Coast (39X)	235.2	259.7	1,753.4	2,034.3
Columbus Monthly	100.1	85.5	631.3	613.8
Connecticut	100.2	86.2	865.5	833.4
D/Magazine, Dallas/Ft. Worth	116.9	114.5	954.1	1,067.9
Denver	50.5	32.0	322.2	315.6
Detroit Monthly	141.0	82.1	686.8	649.3
Grand Rapids	84.0	387.2	58.0	356.6
Gulfshore Life (10X)	—	—	633.8	556.0
Honolulu	60.1	56.9	550.7	537.2
Madison	65.0	78.0	580.5	573.0
Memphis	68.0	54.0	727.0	660.0
Metropolitan Detroit	52.3	72.2	556.0	649.0
Miami/South Florida	62.6	43.3	474.2	584.1
Mid Atlantic Country	39.7	45.6	321.0	364.4
Milwaukee	61.2	65.0	526.6	584.4
Minneapolis/St. Paul	94.1	107.0	892.4	858.9
Nashville	50.0	27.0	396.0	335.0
New England Monthly	47.5	47.2	393.2	332.7
New Jersey Monthly	104.0	87.5	806.9	705.3
New Mexico	33.0	24.4	285.9	235.4
Ohio	97.7	114.2	535.7	564.7
Oregon (6X)	—	—	189.0	—
Orlando	91.0	94.5	848.5	872.3
Palm Beach Life	22.7	26.9	523.3	496.9
Palm Springs Life	275.7	260.0	1,025.9	1,010.2
Philadelphia	179.9	161.5	1,301.3	1,153.5
Phoenix	61.3	69.7	595.7	821.2
Pittsburgh	70.5	73.6	599.8	576.8
St. Louis	59.1	63.5	488.1	421.1
San Diego	120.1	122.3	1,212.3	1,206.4
San Francisco Focus	95.6	93.2	825.3	797.9
Texas Monthly	88.2	103.6	821.2	1,058.6
Twin Cities	106.8	80.5	594.0	480.5
The Virginian (6X)	63.0	58.0	298.6	294.5
Washington (7X)	59.5	61.0	300.0	372.0
The Washingtonian	165.3	169.3	1,300.8	1,318.9
Total Group	3,901.5	4,581.5	29,458.3	30,514.5
% change		-14.8%		-3.5%
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	26.5	20.6	213.0	190.3
Secrets	26.5	20.6	213.0	190.3
True Confessions	26.5	20.6	213.0	190.3
True Experience	26.5	20.6	213.0	190.3
True Love	26.5	20.6	212.9	190.3
True Romance	26.5	20.6	213.0	190.3
Sterling Women's Group:				
Daytime TV	24.5	25.8	221.9	229.7
Modern Screen (6X)	—	—	58.0	63.7
Movie Mirror (6X)	—	—	14.5	18.5
Soap Opera Stars (6X)	—	—	64.3	62.8
TV Movie Screen (6X)	—	—	30.2	34.5
TV Picture Life (6X)	7.0	—	25.3	14.2
Total Group	190.4	149.3	1,692.0	1,565.4
% change		27.6%		8.1%
— Music/entertainment —				
Audio	87.7	78.6	682.1	655.6
Dance Magazine	49.0	45.3	416.5	350.5
Playbill	43.3	47.0	391.9	383.3
Spin	26.7	24.1	249.1	260.4
Stereo Review	65.6	66.6	643.8	627.9
Video Magazine	86.0	81.0	611.0	671.0
Total Group	358.3	342.6	2,994.4	2,948.7
% change		4.6%		1.6%
— National Sunday magazines —				
Parade (52X)	70.7	52.7	446.2	466.8
Total Group	70.7	52.7	446.2	466.8
% change		34.2%		-4.4%
— Outdoor & sport —				
Alaska	28.5	28.7	307.7	374.9
The American Handgunner (6X)	47.0	51.0	229.0	173.0
American Hunter	52.3	37.6	197.5	177.6
American Rifleman	36.2	32.5	217.2	223.1
Backpacker (6X)	23.3	21.1	145.4	140.4
Bass Master (10X) A.	40.1	29.3	510.6	411.4
Bicycling (9X)	64.5	56.0	755.1	639.3
Ducks Unlimited (6X)	75.3	56.0	176.9	166.0
Field & Stream	122.1	134.0	772.4	805.9
Fishing World (6X)	20.8	15.2	190.2	193.3
Florida Sportsman	79.4	67.8	1,091.3	983.3
Flying	70.7	51.8	433.0	360.5
Golf Digest	71.4	64.6	942.8	890.9
Golf Magazine	42.4	27.5	701.1	635.8
Gun Dog (6X)	59.3	56.8	183.2	175.3
Guns	41.0	29.0	285.0	277.0
Guns & Ammo	58.6	68.4	405.8	445.0
In-Fisherman (6X)	—	—	421.0	369.7
Outdoor Life	105.2	97.3	729.3	692.3
Outside Magazine	46.8	41.4	459.6	424.3
Petersen's Hunting	81.5	94.7	448.4	439.2
Runner's World (13X)	31.0	24.5	323.1	271.8
Salt Water Sportsman	80.8	54.2	960.7	798.3
Sierra (6X)	44.5	47.5	195.4	213.4
Shooting Times	68.1	43.3	328.8	329.1
Ski (8X) A.	202.8	156.0	455.1	405.2
Skiing (7X) A.	190.0	204.0	393.3	374.6
Skin Diver	95.2	86.2	956.7	839.6
Southern Outdoors (9X)	71.6	35.9	363.8	295.2
Southern Outdoors Saltwater(8X)	—	—	225.1	—
Sport	39.0	38.7	360.6	349.7
Sports Afield	79.6	81.3	739.4	642.8
Tennis	108.9	101.5	686.2	681.2
Waterski (8X)	51.3	43.3	445.3	347.2
Western Outdoors (10X)	31.3	34.0	315.9	376.1

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

(Continued on Page 82)

(Continued from Page 81)

SEPTEMBER

	Current month 1987	1986	Year-to-date 1987	1986
Wildfowl (6X)	—	—	52.7	51.2
Wing & Shot	28.0	10.0	74.9	10.0
World Tennis	63.8	35.9	314.2	279.9
Total Group	**2,352.3**	**2,057.0**	**16,793.6**	**15,263.2**
% change		**14.4%**		**10.0%**

— Photography —

American Photographer	37.9	41.5	324.7	342.6
Petersen's Photographic	28.0	24.6	238.7	220.9
Popular Photography	80.6	62.0	665.0	581.5
Total Group	**146.5**	**128.1**	**1,228.3**	**1,145.0**
% change		**14.4%**		**7.3%**

— Religious —

Charisma	51.6	42.5	445.2	465.9
Christian Herald (11X)	24.5	27.3	220.4	221.7
Christianity Today (18X)	75.2	56.2	393.0	378.7
Ministries Today (6X)	—	—	157.0	177.8
Moody Monthly	34.8	42.5	303.6	319.9
Our Sunday Visitor (52X)	17.4	9.3	117.7	93.0
Today's Christian Woman (6X)	47.7	34.8	190.2	145.3
Total Group	**251.2**	**212.6**	**1,827.1**	**1,802.3**
% change		**18.2%**		**1.4%**

— Science/electronic /mechanic —

Discover	44.7	41.9	387.5	279.9
Family Computing	35.8	44.4	361.7	368.0
Omni	48.1	54.5	494.7	484.2
Personal Computing	179.1	116.3	1,379.9	1,063.6
Popular Mechanics	59.1	71.7	744.9	826.7
Popular Science	70.5	63.0	608.9	605.8
Scientific American	24.3	26.9	349.6	279.3
Spectrum	75.2	97.7	580.3	746.6
Total Group	**536.7**	**516.4**	**4,907.4**	**4,654.1**
% change		**3.9%**		**5.4%**

— Woman/fashion/service —

Bride's Magazine (6X) A.	—	—	1,825.2	1,544.1
Cosmopolitan A.	233.7	255.6	1,758.1	1,782.9
Essence	93.7	88.3	697.0	722.4
Family Circle (17X) A.	112.1	126.8	1,090.8	1,236.9
Glamour	281.6	271.5	1,664.4	1,598.9
Good Housekeeping A.	158.4	168.0	1,210.4	1,401.3
Harper's Bazaar	287.1	335.6	1,176.7	1,250.4
Health	39.0	41.8	421.0	367.3
Ladies' Home Journal	111.1	110.8	876.0	962.1
Mademoiselle	244.2	226.4	1,336.0	1,171.5
McCall's	94.2	108.0	800.3	805.4
Military Lifestyle	67.7	66.0	391.3	386.6
Modern Bride (6X)	478.5	422.0	1,544.5	1,349.0
Ms.	59.7	37.8	381.5	342.7
New Woman	88.0	92.4	715.5	646.7
Parents Magazine A.	124.0	93.7	946.7	812.7
Redbook	149.5	101.6	877.4	805.3
Savvy	46.2	40.7	310.5	283.4
Self	136.6	109.5	887.8	814.3
Seventeen	141.4	128.0	1,154.7	1,062.2
Shape	96.9	94.8	656.1	655.6
Teen Magazine	79.9	69.7	536.0	477.9
True Story A.	45.2	48.7	417.7	415.5
Vogue	620.2	544.7	2,432.6	2,289.7
W Magazine	169.7	209.5	1,117.8	1,027.2
Woman (9X)	—	26.0	206.0	133.0
Weight Watchers	34.8	42.0	290.6	300.8
Woman's Day (16X) A.	116.5	113.0	1,076.8	1,127.7
Workbasket	32.1	34.8	246.8	270.8
Working Mother	80.9	89.7	698.9	611.6
Working Woman	109.1	117.7	828.7	876.1
Total Group	**4,332.0**	**4,215.0**	**28,573.6**	**27,532.1**
% change		**2.8%**		**3.8%**

— Youth —

Boys' Life	30.0	31.6	151.6	149.8
Campus Life (10X)	49.0	44.3	280.1	272.9
Total Group	**79.0**	**75.9**	**431.7**	**422.7**
% change		**4.1%**		**2.1%**

AUGUST

	Current month 1987	1986	Year-to-date 1987	1986

— Business/national —

Barron's	191.6	133.6	1,623.5	1,421.6
Black Enterprise	49.0	38.5	580.4	612.8
Business Week (52X) A.	232.2	189.9	2,615.1	2,284.4
Business Month	17.6	29.4	204.9	342.1
Financial World (26X)	46.2	35.2	480.2	384.4
Forbes (26X)	133.5	159.7	2,072.6	1,955.7
Fortune (26X)	256.0	195.0	1,153.3	1,628.2
Frequent Flyer	47.0	58.0	446.3	466.6
Futures	41.5	42.8	377.0	358.0
Inc. Magazine A.	57.6	49.5	664.0	661.6
Income Opportunities	—	—	502.6	396.1
Industry Week (25X) A.	97.6	79.3	612.0	686.5
Nation's Business (12X) A.	20.2	26.5	233.5	275.5
Venture	50.8	56.3	494.1	545.2
Total Group	**1,240.8**	**1,093.7**	**12,059.5**	**12,018.5**
% change		**13.4%**		**0.3%**

— Business/regional —

Advantage-Nashville's Bus. Mo.	56.0	59.0	444.0	471.0
Arizona Bus. Gazette (52X)	28.9	27.5	254.9	248.7
Baltimore Bus. Journal	77.8	55.8	667.4	524.3
Boston Bus. Journal (52X)	100.1	101.5	1,047.7	1,041.8
Business Atlantic	59.8	62.7	493.8	517.7
Business First of Columbus	98.4	83.1	810.6	645.1
Business Journal-Milwaukee	159.0	104.9	990.0	813.0
Business Journal-Sacramento	84.0	48.8	506.1	340.7
Business North Carolina	48.5	59.0	351.3	335.1
Capital Dist. Bus. Review (52X)	68.7	—	639.2	—
Cincinnati Business Courier	107.6	48.7	849.5	578.8
Corporate Report Kansas City	14.1	—	178.7	211.4
Corporate Report Minnesota	58.0	69.0	578.0	593.0
Crain's Chicago Bus. (52X)	145.4	139.4	1,143.4	1,270.5
Crain's Cleveland Bus. (52X)	73.5	65.0	472.7	474.0
Crain's Detroit Bus. (52X)	89.7	63.5	598.0	475.7
Crain's New York Bus. (52X)	31.2	22.2	280.7	261.1
Florida Trend (13X)	53.3	57.9	609.3	629.2
Georgia Trend	41.1	42.0	521.0	412.6
Grand Rapids Bus. Journal	66.5	33.7	365.0	272.5
Hawaii Business	79.4	76.5	381.6	384.9
Houston Bus. Journal (52X)	85.8	82.8	520.0	673.0
Indianapolis Bus. Journal (52X)	147.5	158.8	1,089.0	1,169.5
Los Angeles Bus. Journal(55X)	95.8	33.1	568.2	314.4
Manhattan Inc.	53.5	50.8	546.2	509.8
New England Bus. (20X) A.	44.8	73.0	498.0	620.4
New Orleans City Business	81.6	58.3	444.3	485.5
Pacific Bus. News (52X)	136.2	116.6	934.5	935.5
Philadelphia Bus. Journal (52X)	92.3	93.3	1,040.5	872.2
Pittsburgh Bus. Times (52X)	115.0	117.7	934.0	805.7
Providence Business News	67.5	33.0	548.4	128.2
Regardie's/Washington	136.0	163.0	1,085.0	980.0
San Diego Bus. Journal (52X)	27.5	31.1	254.2	245.0
South Florida Bus. Journal	75.6	76.0	769.2	833.3
St. Louis Bus. Journal (52X)	127.9	119.2	1,002.3	1,084.9
Texas Business	48.1	62.6	269.8	471.9
Warfields Monthly Baltimore	51.1	32.7	502.6	242.5
Total Group	**2,927.1**	**2,522.1**	**23,188.9**	**20,872.7**
% change		**6.1%**		**11.1%**

— National Sunday magazines —

Parade (52X)	70.7	52.7	446.2	466.8
USA Weekend (52X)	37.3	49.2	305.4	399.9
Total Group	**108.0**	**101.9**	**751.6**	**866.7**
% change		**6.0%**		**-13.3%**

— Newspaper Sunday magazines —

Boston Globe	179.6	179.0	1,428.4	1,407.1
Chicago Tribune	91.2	63.7	802.2	675.2
Cleveland Plain Dealer	62.8	65.5	459.1	378.9
Columbus Dispatch	44.9	29.8	292.1	352.4
Detroit News	79.0	90.0	558.0	603.0
L.A. Times	46.0	47.9	451.7	545.4
Louisville Courier-Journal	36.0	63.0	470.0	397.0
New York Times Magazine	374.9	322.5	2,411.8	2,317.9
Philadelphia Inquirer	59.0	71.0	508.0	513.0
Seattle Times	66.0	84.0	442.0	436.0
St. Louis Post Dispatch	92.6	73.9	573.9	434.4
Toledo Blade Magazine	38.6	86.4	315.2	371.7
Washington Post	82.2	104.1	958.6	899.5
Total Group	**1,252.9**	**1,280.8**	**9,671.1**	**9,331.5**
% change		**-2.2%**		**3.6%**

— Weeklies/bi-weeklies —

The Advocate (9X)	119.5	105.7	1,056.1	1,011.6
Army Times Military Group:				
Air Force Times (52X)	154.8	149.7	1,277.4	1,369.9
Army Times (52X)	152.0	140.0	1,254.4	1,294.4
Navy Times (52X)	178.2	154.6	1,401.5	1,451.6
The Blood-Horse (52X)	388.9	568.1	2,825.7	3,096.3
Capper's (26X)	15.2	24.9	219.1	207.2
Commonweal (22X)	2.8	3.0	62.4	48.6
Golf World (43X)	90.6	81.6	822.2	742.2
Grit (52X) A.	21.2	22.8	214.3	188.2
National Journal (50X)	43.0	31.3	491.5	433.5
National Review (25X)	23.2	30.0	244.1	237.0
New Republic (48X)	27.9	22.2	292.4	263.6
New York Magazine (50X)	199.5	199.7	1,802.3	1,833.4
New Yorker	131.1	158.7	1,380.4	1,458.4
Newsweek (52X) A.	159.8	105.5	1,488.4	1,434.1
People (52X)	268.0	208.3	2,135.6	2,233.5
Rolling Stone (25X)	155.0	85.6	1,030.8	821.5
Sporting News (52X)	52.1	59.3	401.2	407.1
Sports Illustrated (52X) A.	201.4	132.0	1,642.4	1,645.9
Time (52X) A.	132.4	120.6	1,487.1	1,501.9
Travelhost (52X) C.	3,698.0	3,625.0	25,034.0	25,537.0
TV Guide (52X) A.	217.7	171.6	2,204.7	2,154.3
TV Update (52X) C.	2,660.0	2,095.0	18,854.0	17,845.0
Us Magazine (26X)	38.9	36.3	361.3	314.5
U.S. News & World Report (52X) A.	116.7	79.3	955.6	949.2
Total Group	**9,247.9**	**8,410.7**	**68,938.9**	**68,480.1**
% change		**10.0%**		**0.7%**

— Foreign —

Business Week Int'l (52X)	68.3	61.0	851.2	949.2
De Armas Publications:				
Geomundo:				
Central America	2.0	3.0	43.0	29.0
Chile	—	4.0	34.0	33.0
Colombia	8.0	6.0	95.5	60.8
Ecuador	2.0	4.0	40.0	24.0
Mexico	4.0	5.0	65.5	64.2
Peru	1.0	3.0	38.0	21.0
Puerto Rico	1.0	1.0	40.0	22.5
U.S.	4.0	4.0	32.7	38.0
Venezuela	9.5	6.0	135.0	99.5
Hombre De Mundo:				
Central America	3.0	1.0	41.0	39.0
Chile	2.0	2.0	39.0	41.0
Colombia	10.5	10.0	87.8	105.2
Ecuador	2.0	1.0	36.0	36.0
Mexico	3.5	10.5	74.0	112.5
Peru	—	1.0	26.0	24.0
Puerto Rico	2.0	1.0	44.0	34.0
U.S.	11.0	5.0	103.8	79.0
Venezuela	12.5	14.5	133.0	145.5
Ideas Para Su Hogar:				
Colombia	9.0	9.2	75.2	77.0
Ecuador	2.5	2.0	18.0	16.0
Mexico	12.8	6.7	64.0	49.7
Peru	3.0	1.0	35.5	25.5
Puerto Rico	—	0.2	—	0.2
U.S.	4.0	2.0	32.5	25.0
Venezuela	13.5	9.0	62.5	72.7
Mecanica Popular:				
Argentina	6.7	9.2	59.8	32.0
Central America	8.2	7.3	68.3	68.2
Chile	4.0	3.0	32.7	35.0
Colombia	18.7	14.3	142.3	117.0
Mexico	21.7	16.5	141.7	84.2
Peru	14.3	13.8	103.8	85.7
Puerto Rico	6.7	6.8	58.8	52.2
U.S.	4.3	5.0	33.8	48.0
Venezuela	10.7	10.5	111.5	85.5
Vanidades Continental:				
Central America	10.5	9.7	104.5	112.0
Chile	2.7	1.7	30.3	28.2
Colombia	64.3	91.3	464.8	531.5
Ecuador	15.5	13.7	129.0	136.2
Mexico	66.0	75.0	542.2	563.5
Peru	16.8	10.8	137.8	119.2
Puerto Rico	27.3	23.2	250.0	251.0
U.S.	31.5	39.0	367.8	328.3
Venezuela	33.8	31.5	285.3	263.0
Hearst International:				
Buenhogar:				
Central America	1.0	1.0	5.0	9.0
Chile	—	1.0	7.0	10.0
Colombia	51.5	37.3	233.5	237.2
Ecuador	14.0	13.0	79.0	86.0
Mexico	37.2	32.3	228.2	232.0
Peru	15.0	11.0	98.5	61.5
Puerto Rico	6.5	10.5	27.8	73.5
U.S.	10.5	13.0	157.0	155.3
Venezuela	25.0	23.3	172.7	149.0
Cosmopolitan en Espanol:				
Central America	2.2	5.0	40.2	29.3
Colombia	21.7	15.2	129.5	99.5
Ecuador	1.0	—	17.0	—
Mexico	29.7	37.3	295.2	300.7
Peru	—	—	2.0	—
Puerto Rico	8.2	10.5	106.8	79.5
U.S.(Spanish language)	14.3	18.8	199.0	192.5
Venezuela	16.8	18.0	134.5	102.3
Cosmopolitan Foreign Editions:				
Australia	69.6	72.0	493.7	479.4
Brazil	50.3	61.1	477.4	466.3
China	28.0	59.4	327.7	320.0
France	34.8	40.3	791.6	656.5
Germany	76.3	68.7	901.1	799.0
Great Britain	112.0	98.0	783.0	814.5
Greece	25.0	23.0	310.0	310.0
Holland	27.0	33.0	465.0	482.0
Italy	31.0	19.3	557.8	479.4
Japan	40.8	35.3	377.8	389.7
South Africa	81.0	87.0	536.0	571.0
Good Housekeeping Foreign:				
Australia	47.8	46.0	258.9	257.8
Great Britain	108.0	96.3	978.1	939.8
International Management:				
English	29.0	31.0	208.3	294.8
Middle East	7.8	37.5	48.9	97.0
Johnston International:				
Alam Attijarat	14.5	25.5	183.9	258.7
Far East Business	27.2	47.0	207.4	288.4
Modern Africa (6X)	13.3	25.1	48.8	78.3
Latin America Finance (6X)	26.2	20.4	93.1	92.5
Newsweek International A.:				
Atlantic (52X)	40.0	35.3	503.4	573.1
Latin America (52X)	21.2	17.5	180.7	224.6
Asia (52X)	42.5	32.3	374.8	416.8
Progreso (9X)	5.6	8.3	31.5	50.5
Reader's Digest:				
Arabic	7.0	8.0	66.0	47.5
Asian	46.0	210.5	1,228.0	1,642.0
Australian	37.0	41.3	367.0	446.0
Belgian-Flemish	9.5	27.0	349.0	513.1
Belgian-French	6.5	21.0	236.5	302.6
British	44.4	33.7	359.5	354.5
Chinese B.	58.3	80.8	688.4	788.0
Danish	10.5	12.8	206.8	225.6
Dutch	3.5	27.5	267.1	270.6
Finnish	27.0	39.0	362.0	371.8
French	12.0	3.5	184.2	106.2
German	46.0	35.7	543.6	461.9
Iberian	—	1.0	2.0	9.5
Indian-English	56.0	49.5	553.5	526.5
Indian-Hindi	4.5	9.5	98.0	65.5
Italian	26.0	20.0	355.5	249.5
Korean	41.5	33.0	268.1	197.5
Latin American:				
Argentina	14.0	11.0	85.5	94.0
Brazil	—	—	—	18.0
Central American	5.0	8.0	31.0	53.0
Chile	12.0	7.0	81.0	85.5
Colombia	25.0	20.0	182.5	162.0
Ecuador	3.0	6.0	20.0	47.0
Mexico	65.8	62.6	459.7	430.8
Peru	3.0	8.0	28.0	55.0
Puerto Rico	4.0	5.0	25.0	36.5
U.P.B.	3.0	6.0	24.5	45.0
U.S. Spanish	8.5	25.5	62.5	137.0
Venezuela	3.0	4.0	29.0	46.0
New Zealand	45.0	52.0	370.5	411.8
Norwegian	17.0	4.5	119.8	58.0
Portugal	30.5	27.0	290.5	306.5
South African	59.5	97.0	542.5	583.0
Swedish	5.0	4.0	50.0	103.5
Swiss-French	11.0	13.0	162.5	163.3
Swiss-German	10.0	15.0	219.0	213.0
Time International:				
Time-Asia	47.1	39.8	366.2	508.3
Time-Atlantic	42.6	32.5	572.0	656.4
Time-Canada	83.6	73.9	1,049.6	1,244.6
Time-Latin America	28.1	22.5	223.9	328.7
Visao (52X)	100.3	138.8	798.0	1,051.0
Vision/Latin America (24X) A.	21.3	21.6	179.4	193.9
Total Group	**2,851.4**	**3,180.0**	**28,491.2**	**29,931.6**
% change		**-10.3%**		**-4.8%**